

Managing Equity Portfolios

London (UK)

22 - 26 December 2025

UK Training

PARTNER



Managing Equity Portfolios

Code: FA28 From: 22 - 26 December 2025 City: London (UK) Fees: 4400 Pound

Introduction

In today's dynamic and often unpredictable financial environment, Managing Equity Portfolios has become a core competency for professionals and institutions aiming to maximize returns, control risk, and align investment decisions with strategic goals.

Whether you're a C-suite executive, a finance manager, or a mid-career analyst working in sectors such as oil and gas, government, telecommunications, banking, or project management, understanding how to effectively manage equity portfolios is key to driving institutional performance and ensuring long-term value creation.

This course empowers participants with modern tools and frameworks to build, monitor, and optimize stock portfolios in both developed and emerging markets, particularly within the Middle East and North Africa MENA region.

Course Objectives

- Understand the foundational principles of equity portfolio management.
- Analyze risk-return profiles and align portfolios with investor goals.
- Apply equity valuation models e.g., DCF, multiples-based models.
- Utilize diversification strategies and modern portfolio theory.
- Monitor portfolio performance and adjust asset allocations effectively.
- Evaluate the impact of macroeconomic policies and market volatility.
- Use advanced digital tools for investment decision-making.
- Examine real-world equity portfolios' successes and failures.

Course Outlines

Day 1: Introduction to Financial Markets and Portfolio Concepts

- Overview of equity markets and instruments.
- Institutional vs. individual portfolio objectives.
- Definitions of return, risk, and their measurements.
- Behavioral finance and investor biases.
- Aligning portfolio design with risk appetite and strategic goals.
- Practical activity: Analyze an existing portfolio sample.

Day 2: Equity Analysis Techniques and Investment Selection

- Fundamental vs. technical analysis in equity research.
- Tools and models for stock valuation.
- Financial ratios and performance indicators P/E, ROE, EPS.
- Economic indicators and their impact on stock prices.

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The text 'UK Training PARTNER' is overlaid on the board.

UK Training
PARTNER

- Sector analysis and market timing.
- Group workshop: Compare two listed companies' equity potential.

Day 3: Portfolio Construction and Diversification Management

- Portfolio design and structuring approaches.
- Diversification principles to minimize unsystematic risk.
- Applying Modern Portfolio Theory Markowitz model.
- Sectoral and geographic asset allocation strategies.
- Tools for ongoing performance tracking.
- Workshop: Design a mock portfolio for a simulated investor case.

Day 4: Risk Management and Dynamic Rebalancing

- Understanding Value at Risk VaR and scenario analysis.
- Hedging techniques using financial derivatives.
- Dynamic portfolio rebalancing approaches.
- Dealing with market shocks and drawdowns.
- Tools and software for risk and performance analytics.
- Simulation: Crisis scenario and live portfolio reallocation.

Day 5: Final Integration and Performance Review

- Recap of all core portfolio concepts and strategies.
- Case study: Corporate shift in investment strategy.
- Capstone project: Build and present a full portfolio strategy.
- Final assessment: Portfolio evaluation and optimization test.
- Presentation of certificates and peer feedback.
- Open discussion: Region-specific challenges and future trends.

Why Attend this Course: Wins & Losses!

- Gain practical tools and ready-to-use models for managing real portfolios.
- Improve your investment decision-making and financial leadership.
- Understand local and global market dynamics more deeply.
- Increase returns and reduce exposure through smarter diversification.
- Build expertise in equity valuation and risk analytics.
- Earn a recognized certification to enhance your career.
- Network with other professionals and portfolio managers.
- Stay up to date with global best practices and investment trends.

Conclusion

In markets marked by uncertainty and evolving economic shifts, Managing Equity Portfolios stands as a vital professional skill. From corporate treasuries to private investment offices, effective portfolio management ensures that capital is not only protected—but multiplied.

This course blends technical knowledge with real-world practice to equip participants with the tools, insights, and confidence to build resilient, high-performing portfolios. Whether you're responsible for internal investment strategy

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The text 'UK Training PARTNER' is overlaid on the board.

UK Training
PARTNER



or external client portfolios, the skills gained here will drive smarter decisions and measurable outcomes.

UK Training
PARTNER

Head Office: +44 7480 775 526
Email: Sales@blackbird-training.com
Website: www.blackbird-training.com



Blackbird Training Cities

Europe



Malaga (Spain)



Sarajevo (Bosnia and Herzegovina)



Oporto (Portugal)



Glasgow (Scotland)



Edinburgh (UK)



Oslo (Norway)



Annecy (France)



Bordeaux (France)



Copenhagen (Denmark)



Birmingham (UK)



Lyon (France)



Moscow (Russia)



Stockholm (Sweden)



Podgorica (Montenegro)



Batumi (Georgia)



London (UK)



Istanbul (Turkey)



Amsterdam



Düsseldorf (Germany)
(Switzerland)



Paris (France)



Athens (Greece)



Barcelona (Spain)



Munich (Germany)



Geneva



Prague (Czech)



Vienna (Austria)



Rome (Italy)



Brussels



Madrid (Spain)



Berlin (Germany)



Lisbon (Portugal)



Zurich



Manchester (UK)



Milan (Italy)



Blackbird Training Cities

USA & Canada



Los Angeles (USA)



Orlando, Florida (USA)



Online



Phoenix, Arizona (USA)



Houston, Texas (USA)



Boston, MA (USA)



Washington (USA)



Miami, Florida (USA)



New York City (USA)



Seattle, Washington (USA)



Washington DC (USA)



In House



Jersey, New Jersey (USA)



Toronto (Canada)

ASIA



Baku (Azerbaijan)
(Thailand)



Maldives (Maldives)



Doha (Qatar)



Manila (Philippines)



Bali (Indonesia)



Bangkok



Beijing (China)



Singapore (Singapore)



Sydney



Tokyo (Japan)



Jeddah (KSA)



Riyadh (KSA)



Melbourne (Australia)
Korea



Phuket (Thailand)



Dubai (UAE)



Kuala Lumpur (Malaysia)



Kuwait City (Kuwait)



Seoul (South)



Pulau Ujong (Singapore)



Irbid (Jordan)



Jakarta (Indonesia)



Amman (Jordan)



Beirut

UK Training
PARTNER

Blackbird Training Cities

AFRICA



Kigali (Rwanda)



Cape Town (South Africa)



Accra (Ghana)



Lagos (Nigeria)



Marrakesh (Morocco)



Nairobi (Kenya)



Zanzibar (Tanzania)



Tangier (Morocco)



Cairo (Egypt)



Sharm El-Sheikh (Egypt)



Casablanca (Morocco)



Tunis (Tunisia)



Blackbird Training Clients

 <p>MANNAI CORPORATION MANNAI Trading Company WLL, Qatar</p>	 <p>GAC UNE FILIALE D' EGA Alumina Corporation Guinea</p>	 <p>Booking.com Booking.com Netherlands</p>	 <p>OXFAM Oxfam GB International Organization, Yemen</p>	 <p>Capital Markets Authority Kuwait</p>
 <p>WS Waltersmith Petroman Oil Limited Nigeria</p>	 <p>QNB Qatar National Bank (QNB), Qatar</p>	 <p>Qatar Foundation Qatar</p>	 <p>AFRICAN UNION ADVISORY BOARD ON CORRUPTION Tanzania</p>	 <p>KFAS Kuwait Foundation for the Advancement of Sciences KFAS Kuwait</p>
 <p>Reserve Bank of Malawi Malawi</p>	 <p>Central Bank of Nigeria Nigeria</p>	 <p>Ministry of Interior Kingdom of Saudi Arabia Ministry of Interior, KSA</p>	 <p>Mabruk Oil Company Libya</p>	 <p>Saudi Electricity Company KSA</p>
 <p>BPKH Badan Pengelola Keuangan Haji BADAN PENGELOLA KEUANGAN Haji, Indonesia</p>	 <p>NATO Italy</p>	 <p>ENI ENI CORPORATE UNIVERSITY, Italy</p>	 <p>GULF BANK Gulf Bank Kuwait</p>	 <p>General Organization for Social Insurance KSA</p>
 <p>Defence Space Administration Nigeria</p>	 <p>National Industries Group (Holding) Kuwait</p>	 <p>Hamad Medical Corporation Qatar</p>	 <p>USAID Pakistan</p>	 <p>STC STC Solutions, KSA</p>
 <p>North Oil Company North Oil company,</p>	 <p>EKO Electricity</p>	 <p>OMAN BROADBAND Oman Broadband</p>	 <p>UNITED NATIONS UN.</p>	 <p>Authority for Electricity Regulation, Oman Authority for</p>

UK Training
PARTNER

Blackbird Training Categories

Management & Admin

Entertainment & Leisure
Professional Skills
Finance, Accounting, Budgeting
Media & Public Relations
Project Management
Human Resources
Audit & Quality Assurance
Marketing, Sales, Customer Service
Secretary & Admin
Supply Chain & Logistics
Management & Leadership
Agile and Elevation

Technical Courses

Artificial Intelligence (AI)
Hospital Management
Public Sector
Special Workshops
Oil & Gas Engineering
Telecom Engineering
IT & IT Engineering
Health & Safety
Law and Contract Management
Customs & Safety
Aviation
C-Suite Training



 International House 185 Tower Bridge
Road London SE1 2UF United Kingdom

 +44 7401 1773 35
+44 7480 775526

 Sales@blackbird-training.com

 www.blackbird-training.com

UK Training
PARTNER

